

IN THE CLAIMS:

1 1. (Currently Amended) A financial services outsourcing method for facilitating out-
2 sourcing of tax return preparation services for numerous clients on behalf of a direct ser-
3 vice provider serving the numerous clients, the financial services being outsourced to a
4 given outsourcing group, the clients comprising a first set of clients in a first country,
5 having tax return filing obligations for the first country, and comprising a second set of
6 clients in a second country having tax return filing obligations for the second country, the
7 method comprising:

8 for the direct service provider, loading, onto a remotely accessible part of a host
9 server, client specific financial files and corresponding reference materials, the host
10 server providing access to a remote computer client of information concerning the client
11 specific financial files and corresponding reference materials;

12 providing ~~the~~ outsourced personnel with limited screen shot access to the host
13 server connected through a remote limited access client located outside the first and sec-
14 ond countries, wherein the direct service provider has control of the host server and the
15 client specific financial files and corresponding reference materials pertaining to a given
16 tax return loaded thereon;

17 preparing tax returns for the clients of the direct service provider by the out-
18 sourced personnel, the outsourced personnel located outside the first and second countries
19 and utilizing the limited screen shot access of the client specific financial files and corre-
20 sponding reference materials on the host server; and

21 monitoring and reporting to the direct service provider a status of the tax return
22 preparation during the tax return preparation performed by the outsourced personnel,
23 wherein the direct service provider can obtain a status report in response to a status
24 change occurring with the tax return preparation.

1 2. (Original) The method according to claim 1, wherein the tax return preparation ser-
2 vices comprise individual tax return preparation services.

1 3. (Original) The method according to claim 1, wherein the tax returns are outsourced
2 through an intermediary firm to the outsourced personnel.

1 4. (Currently Amended) The method according to claim 3, further comprising the inter-
2 mediary firm interacting with the outsourced personnel through use of a servicing com-
3 puter system, and interacting with ~~the~~ plural direct service providers through use of the
4 servicing computer system.

1 5. (Currently Amended) The method according to claim 3, wherein the direct service
2 providers comprise an accounting firms.

1 6. (Cancelled).

1 7. (Previously Presented) The method according to claim 1, wherein the host server com-
2 prises a CITRIX server.

1 8. (Cancelled).

1 9. (Cancelled).

1 10. (Original) The method according to claim 1, wherein the host server comprises an
2 ASP server running tax software for use by plural independent direct service providers
3 provided with access to the ASP server.

1 11. (Original) The method according to claim 2, wherein the host server comprises an
2 ASP server running tax software for use by plural independent direct service providers
3 provided with access to the ASP server.

- 1 12. (Original) The method according to claim 1, wherein the corresponding reference ma-
2 terials comprise image files of physical reference materials.
- 1 13. (Original) The method according to claim 1, wherein the client specific financial files
2 and corresponding reference materials comprise tax filer specific tax file and image files.
- 1 14. (Original) The method according to claim 13, further comprising loading onto the
2 remotely accessible part of the host server tax preparation software.
- 1 15. (Original) The method according to claim 1, wherein the outsourced personnel pre-
2 pare tax returns while located in India.
- 1 16. (Previously Presented) The method according to claim 1, further comprising the di-
2 rect service provider interviewing a tax filer and obtaining supporting documentation for
3 the tax filer's tax return.
- 1 17. (Original) The method according claim 16, wherein the direct service provider com-
2 prises an accounting firm.
- 1 18. (Currently Amended) The method according to claim 16, wherein the supporting
2 documentation comprises ~~the~~ last season tax return as filed, receipt, and summary infor-
3 mation regarding finances of the tax filer.
- 1 19. (Previously Presented) The method according to claim 18, further comprising the di-
2 rect service provider setting up a tax file compatible with a given tax software package,
3 and rendering the supporting documentation electronic.
- 1 20. (Original) The method according to claim 19, wherein rendering the supporting docu-
2 mentation electronic comprises scanning supporting documents into image files.